

All:

The purpose of these emails is to inform users of important updates or enhancements to the GEARS financial system and/or changes and reminders in reference to work processes. The emails are distributed to all people that have a GEARS user account. Upon receipt, please review the emails for any information that may be pertinent to your position and department. All previous GEARS update emails can be found on the courtnet GEARS site under the Archived Messages link.

### **PROCURE TO PAY:**

**NOTIFICATIONS** – Beginning tomorrow staff may start to receive email notifications regarding requisitions, Express POs and POs. While these processes have been utilized in the past, the GEARS Team had to do some work on these items, so they are being reinitialized tomorrow. The work was needed to adjust the recipient of the notification when the original creator has left the Judiciary or has changed the location in which they work. In these instances, the notification will be sent to other staff within the relevant department that have the same GEARS applicable role and PCA security.

**Requisition Notification Email** – These emails are sent out weekly from September 30 through June 1 and will assist our users in monitoring their requisitions and pre-encumbrances more closely. Specifically, the emails will be sent to the requisition creator, as well as all people that have approved the requisition to date. If the creator of the requisition has left the Judiciary or transferred to another department, the message will go to other GEARS users with the same requisition creation role and PCA access. The requisitions included in the notifications will be those that are older than 30 days from the email date and are in open status (not fully approved, not successfully budget checked or not submitted for approval). It is important that these emails are reviewed timely and appropriate action is taken. The subject line of the emails will be **“Requisition requires your attention.”** Please see below for a sample of the email content.

A requisition must have a valid budget status and be approved for the Procurement Department to issue a related purchase order. The below requisition does not meet this

criteria. Please review the information and take the appropriate required action(s) or if the requisition is no longer needed, please cancel it.

Requisition Number: 0000009010  
Requisition Date: 2018-08-28  
Requisition Amount: \$56,729.00  
Requisition Description: FY19 DCREP Coordinator  
Approval Status: Pending  
Budget Status: Error

If you have any questions, please contact Procurement.

**Express PO (XPO) Notification Email** – These emails will be sent out monthly from September 30 through June 1 on the first Monday of each month and will assist our users in monitoring their Express PO's and encumbrances more closely. Specifically, the emails will be sent to the Express PO creator, as well as all people that have approved the Express PO to date. If the creator of the Express PO has left the Judiciary or transferred to another department, the message will go to other GEARS users with the same XPO creation role and PCA access. The Express POs included in the notifications will be those that have not had any voucher activity within 30 days from the email date and are approved and dispatched with an open balance. It is important that these emails are reviewed timely and appropriate action is taken. (All email notices for XPOs associated with District Court will be sent only to staff within the DCHQ Finance Office.) The subject line of the emails will be “**Express PO requires your attention.**” Please see below for a sample of the email content.

The Express PO(s) (details seen below) have not had any voucher activity in the past 30 days. Please review the information and take the appropriate required action(s) or if the Express PO is no longer needed, please cancel it.

PO Date: 2018-08-30  
PO Number: 0000069558  
PO Total Amount: \$197.12  
PO Description: BPO - Office Supplies  
Total Vouchered Amount: \$.00  
PO Balance: \$197.12

If you have any questions, please contact Procurement.

**Purchase Order (PO) Spending Notification Email** – These emails will be sent out monthly from January through June on the first Monday of each month and the intent of these emails is to assist users in proactively managing their open encumbrances and budgets by providing notification of POs that are underspent when evaluating the amount expensed to date and the percentage of time expired on the PO. If a PO has a variance of more than 20% from the expected spending, an email will be sent to the related PO requisition creator, as well as the approvers, alerting them and requesting that appropriate actions be taken. If the creator of the related PO requisition has left the Judiciary or transferred to another department, the message will go to other GEARS users with the same requisition creation role and PCA access. (All email notices for POs associated with District Court will be sent only to staff within the DCHQ Finance Office.)

All emails and POs should be reviewed. If a PO encumbrance balance is not going to be used either in full or in part, the PO should be canceled, or the PO lines should be reduced. Below is an example of the email wording and the email subject line will be “PO Requires your Attention.”

*To assist users in proactively managing their open encumbrances and budgets, this message is serving as an alert about a Purchase Order (PO) that is currently underspent. The PO displayed has a voucher total that is more than 20% below the expected spend threshold for the time-period remaining on the PO.*

*Please review the information and take the appropriate required action(s), such as vouchering open invoices, reducing PO lines, or closing the PO if the balance is no longer needed.*

*PO Date: XXXX-XX-XX  
PO Number: XXXXXXXXXXXX  
Vendor ID: XXXXXXXX  
Vendor Name: XXXXXXXXXXXXXXXXXXXXXXXX  
PO Description: XXXXXXXXXXXXXXXXXXXXXXXX  
PO Total Amount:   \$10,000.00  
Total Vouchered Amount:   \$2,000.00  
PO Spend:   20.00%  
PO Time Expired: 50.00%*

*If you should have any questions, please contact the Department of Procurement, Contract & Grant Administration.*

If you should any questions about the above information, please feel free to contact me. Service Now tickets may also be created if you receive an email and would like assistance.

Thank you,



**Tammy Sitar, CPA**

*Director*

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